



### Market Snapshot

| KEY INDICES          | This Week | Previous Week | Change |
|----------------------|-----------|---------------|--------|
| S&P CNX Nifty        | 10323.05  | 10146.55      | 1.74%  |
| Sensex               | 33157.22  | 32389.96      | 2.37%  |
| BSE Midcap           | 16379.58  | 16076.42      | 1.89%  |
| BSE Smallcap         | 17303.66  | 17081.44      | 1.30%  |
| Nifty Mid 100 free   | 19341.20  | 18789.90      | 2.93%  |
| Nifty Small 100 free | 8372.20   | 8068.00       | 3.77%  |

### Sectoral Snapshot

| KEY INDICES    | This Week | Previous Week | Change |
|----------------|-----------|---------------|--------|
| Bse Auto       | 25305.86  | 24826.00      | 1.93%  |
| BSE Cap Goods  | 18294.50  | 17485.80      | 4.62%  |
| BSE Cons Durab | 17897.54  | 18253.66      | -1.95% |
| BSE FMCG       | 10277.77  | 10249.28      | 0.28%  |
| BSE IT         | 10417.09  | 10360.42      | 0.55%  |
| BSE Metal      | 15020.98  | 14541.84      | 3.29%  |
| BSE Oil        | 16365.51  | 15894.56      | 2.96%  |
| BSE Power      | 2340.08   | 2253.22       | 3.85%  |
| BSE PSU        | 9377.34   | 8499.28       | 10.33% |
| BSE Reality    | 2188.39   | 2165.72       | 1.05%  |
| BSE Bankex     | 28096.49  | 26842.53      | 4.67%  |
| BSE Healthcare | 14140.93  | 14137.39      | 0.03%  |

### Sensex Gainers - Weekly

| Scripts             | This Week | Previous Week | Change |
|---------------------|-----------|---------------|--------|
| State Bank of India | 310.95    | 242.50        | 28.23% |
| ICICI Bank Ltd      | 300.95    | 257.85        | 16.72% |
| ADANI PORTS         | 431.85    | 401.50        | 7.56%  |
| Larsen & Toubro Ltd | 1223.50   | 1141.00       | 7.23%  |
| ONGC                | 183.55    | 172.15        | 6.62%  |

### Sensex Losers - Weekly

| Scripts         | This Week | Previous Week | Change |
|-----------------|-----------|---------------|--------|
| Lupin Ltd       | 1000.85   | 1052.50       | -4.91% |
| KOTAKBANK       | 1032.65   | 1079.35       | -4.33% |
| HDFC Bank Ltd   | 1793.10   | 1850.35       | -3.09% |
| HDFC            | 1698.00   | 1747.45       | -2.83% |
| Tata Motors-DVR | 237.70    | 241.35        | -1.51% |

### Nifty Gainers - Weekly

| Scripts              | This Week | Previous Week | Change |
|----------------------|-----------|---------------|--------|
| State Bank of India  | 311.05    | 242.75        | 28.14% |
| ICICI Bank Ltd       | 301.15    | 257.85        | 16.79% |
| ZEEL                 | 541.50    | 489.35        | 10.66% |
| UltraTech Cement Ltd | 4439.85   | 4034.35       | 10.05% |
| GAIL (India) Ltd     | 471.10    | 433.25        | 8.74%  |

### Nifty Losers - Weekly

| Scripts              | This Week | Previous Week | Change  |
|----------------------|-----------|---------------|---------|
| Yes Bank Ltd         | 307.05    | 357.80        | -14.18% |
| Bharti Infratel Ltd  | 418.55    | 460.25        | -9.06%  |
| HCL Technologies Ltd | 854.95    | 922.30        | -7.30%  |
| IBULHSGFIN           | 1264.30   | 1360.70       | -7.08%  |
| Lupin Ltd            | 1001.10   | 1051.20       | -4.77%  |

### FII & DII Activities (Rs Crore) for the period of 19/10/2017 to 27/10/2017

| Activities | FIIs     | DIIs     |
|------------|----------|----------|
| Buy        | 44353.30 | 25460.82 |
| Sell       | 38138.61 | 25183.38 |
| Net        | 6214.69  | 277.44   |

## Market vaults on Govt's boost of capital spend

Market registered strong gains in the week ended Friday, 27 October 2017. The two key benchmark indices viz. the barometer index, the S&P BSE Sensex and the Nifty 50 index scaled record highs on the government's booster dose to the economy through capitalisation of public sector banks (PSBs) in a front-loaded manner, with a view to support credit growth and job creation. The Sensex closed past 33,000 levels. It surged 767.26 points or 2.36% to settle at 33,157.22. The Nifty jumped 176.50 points or 1.73% to settle at 10,323.05. The S&P BSE Mid-Cap index spurred 1.88%. The S&P BSE Small-Cap index surged 1.3%.

On the macro front, the government decided to take a massive step to capitalise public sector banks (PSBs) in a front-loaded manner, with a view to support credit growth and job creation. This entails mobilisation of capital, with maximum allocation in the current year, to the tune of about Rs 2.11 lakh crore over the next two years, through budgetary provisions of Rs 18139 crore, recapitalisation bonds to the tune of Rs 1.35 lakh crore, and the balance through raising of capital by banks from the market while diluting government equity (estimated potential Rs 58000 crore). There will be a strong push on enabling growth of micro- small and medium enterprises (MSMEs) through enhanced access to financing and markets, and a drive to finance MSMEs in 50 clusters.

Among global data, China's Communist Party revealed its new top leadership helmed by President Xi Jinping, breaking with recent precedent by failing to include a clear successor among the seven-man line-up. Apart from Xi, Premier Li Keqiang was the only one to retain his spot amid sweeping changes on the Politburo Standing Committee, the height of power in China.

In US, the House of Representatives helped pave the way for deep tax cuts sought by President Donald Trump and Republican leaders.

State Bank of India (SBI) was the biggest gainer from both Nifty and Sensex pack after the government approved recapitalization plans of Rs 2 lakh, 11 thousand crore for the ailing PSU banks. Yes Bank was top loser on NSE after the company announced poor quarterly results. On the other hand Lupin was the top loser on BSE for the week.

BSE midcap stocks were led by Union Bank after all the PSU banks rallied following the Govt. recap announcements and top loser was Yes bank.

Amongst BSE sectoral indices BSE PSU was top gainer led by Punjab National bank followed by BSE Bank led by PNB once again. Only loser for the week was BSE Consumer durable due to PC jewelers.

## Outlook and Technical View

Quarterly earnings of India Inc, domestic and global macroeconomic data, trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and crude oil price movement will dictate trend on the bourses next week.

From the technical standpoint, Nifty may find support at 10302, 10279, and 10247 while levels of 10357, 10389, and 10412 may act as resistance, with 10334 being the pivot point.

### BSE Mid-Cap Gainers - Weekly

| Scripts        | This Week | Previous Week | Change |
|----------------|-----------|---------------|--------|
| Union Bank (I) | 175.55    | 126.10        | 39.21% |
| Bank of India  | 180.25    | 134.50        | 34.01% |
| Canara Bank    | 403.75    | 301.80        | 33.78% |
| IDBI Bank      | 62.35     | 51.80         | 20.37% |
| Oriental Bank  | 135.75    | 113.05        | 20.08% |

### BSE Mid-Cap Losers - Weekly

| Scripts          | This Week | Previous Week | Change  |
|------------------|-----------|---------------|---------|
| Yes Bank         | 307.20    | 358.05        | -14.20% |
| Havells India    | 482.85    | 547.35        | -11.78% |
| Indiabulls Hous. | 1264.65   | 1362.45       | -7.18%  |
| LIC Housing Fin. | 614.45    | 661.50        | -7.11%  |
| Torrent Pharma.  | 1265.40   | 1356.75       | -6.73%  |

## World Markets

| KEY INDICES        | This Week | Previous Week | Change |
|--------------------|-----------|---------------|--------|
| DJIA               | 23434.19  | 23328.63      | 0.45%  |
| Nasdaq             | 6701.26   | 6629.06       | 1.09%  |
| Nikkei 225         | 22008.45  | 21457.64      | 2.57%  |
| Straits Times      | 3386.44   | 3340.73       | 1.37%  |
| Hang Seng          | 28438.85  | 28487.24      | -0.17% |
| FTSE 100           | 7505.03   | 7523.23       | -0.24% |
| DAX                | 13217.54  | 12991.28      | 1.74%  |
| Shanghai Composite | 3416.81   | 3378.65       | 1.13%  |
| JAKARTA            | 5975.28   | 5910.53       | 1.10%  |
| Bovespa (Brazil)   | 75975.71  | 76283.16      | -0.40% |
| MICEX (Russia)     | 2068.76   | 2072.73       | -0.19% |
| CAC 40             | 5494.13   | 5368.29       | 2.34%  |

## Nifty Vs. INDIA VIX



# Derivative Weekly Wrap

## Open Interest Details

| Symbol    | Expiry Date | LTP      | Previous LTP | Change | Premium/dis. Over Spot | Open Interest | Prev. Open Interest | Change in OI |
|-----------|-------------|----------|--------------|--------|------------------------|---------------|---------------------|--------------|
| NIFTY     | 30-Nov-2017 | 10360.25 | 10151.55     | 2.06%  | 37.20                  | 306060        | 27537               | 1011.45%     |
| BANKNIFTY | 30-Nov-2017 | 24990.00 | 23980.00     | 4.21%  | 226.45                 | 42074         | 5102                | 724.66%      |

## Cost of Carry

### POSITIVE

| Symbol     | Spot Price | Future Price | Expiry Date | Cost of Carry |
|------------|------------|--------------|-------------|---------------|
| OFSS       | 3525.70    | 3564.50      | 30-Nov-17   | 12.17%        |
| ADANIPOWER | 32.65      | 33.00        | 30-Nov-17   | 11.86%        |
| NHPC       | 28.50      | 28.80        | 30-Nov-17   | 11.64%        |
| TV18BRDCST | 43.40      | 43.85        | 30-Nov-17   | 11.47%        |
| APOLLOHOSP | 1020.55    | 1031.10      | 30-Nov-17   | 11.43%        |
| IDFC       | 63.20      | 63.85        | 30-Nov-17   | 11.38%        |
| KPIT       | 135.35     | 136.70       | 30-Nov-17   | 11.03%        |
| RNAVAL     | 51.20      | 51.70        | 30-Nov-17   | 10.80%        |
| CHENNPETRO | 446.85     | 451.10       | 30-Nov-17   | 10.52%        |
| RCOM       | 15.90      | 16.05        | 30-Nov-17   | 10.43%        |
| SUZLON     | 15.95      | 16.10        | 30-Nov-17   | 10.40%        |
| TATAPOWER  | 85.10      | 85.90        | 30-Nov-17   | 10.40%        |
| GRANULES   | 135.65     | 136.90       | 30-Nov-17   | 10.19%        |

### NEGATIVE

| Symbol    | Spot Price | Future Price | Expiry Date | Cost of Carry |
|-----------|------------|--------------|-------------|---------------|
| OIL       | 351.95     | 348.15       | 30-Nov-17   | -11.94%       |
| IOC       | 414.95     | 410.95       | 30-Nov-17   | -10.66%       |
| GAIL      | 471.10     | 467.30       | 30-Nov-17   | -8.92%        |
| RECLTD    | 173.40     | 172.35       | 30-Nov-17   | -6.70%        |
| BPCL      | 527.95     | 525.15       | 30-Nov-17   | -5.87%        |
| BIOCON    | 358.95     | 357.65       | 30-Nov-17   | -4.01%        |
| WIPRO     | 296.95     | 295.90       | 30-Nov-17   | -3.91%        |
| BANKINDIA | 181.05     | 180.45       | 30-Nov-17   | -3.67%        |

## WEEKLY VOLUME ALERTS

The Following Stocks displayed surge in Volume during the week and can be one of the trigger for deciding trading/investment stocks.

- |                |                  |                     |                 |
|----------------|------------------|---------------------|-----------------|
| 1. SAIL        | 5. Dewan Housing | 9. Rural Elect Cor  | 13. NHPC        |
| 2. Yes Bank    | 6. JSW Energy    | 10. ITC             | 14. DLF         |
| 3. Hind Constr | 7. Ashok Leyland | 11. DCW             | 15. IOC         |
| 4. Adani Power | 8. ONGC          | 12. Indiabulls Real | 16. Tata Motors |

## PUT-CALL RATIO

| Symbol | PUT      | CALL     | RATIO |
|--------|----------|----------|-------|
| NIFTY  | 71440675 | 51834300 | 1.38  |

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